



Version 4.74 Release Notes

Build 4 (Public) Compiled on 11 April 2016



Introduction

Welcome to Accura Version 4.74 Build 4

Accura 4.74 Build 4 is the latest release in our version 4.7x product cycle. The Accura 4.7x generation of software comprises more than 2 years of development work since the release of our previous major version release (Accura 4.60), and includes **two new software add-on modules which are now available for purchase**: Production Scheduling, and Time and Attendance Clocking.

AccuraOnline 3.97 is the latest version of our integrated e-commerce solution, which has been released in conjunction with Accura 4.74. This generation of AccuraOnline (3.8x and 3.9x) has introduced **two new software modules which are available for purchase**: Artwork Editing using a simple (form-based) designer, and Artwork Editing using an Interactive Designer. AccuraOnline 3.97 has seen the introduction of a **third** purchasable module **Domain Branding**.

In addition to the above new optional modules, there is a whole raft of other new features, behaviour changes and bug fixes provided from feedback from existing users.

All clients with a current support contract for Accura (and AccuraOnline if purchased) are entitled to receive and install all software releases as part of their support contract benefits. If you have not already done so, please [sign up for an account](#) on our newly-designed website to access protected software downloads, user manuals and other content. AccuraOnline upgrades are distributed automatically when released by Accura support.

If you have any questions or queries about the new features or any other Accura related matter, please contact your Accura Support team by emailing support@accuramis.com.

About This Document

Accura 4.74 provides the 'back-end' for Accura Online's domain branding and as such is a major feature upgrade. However, other Accura features, changes and fixes are not numerous and so the technical release notes are contained at the end of this document in addition to the more generic New Features.

This document details all **minor changes, features and fixes** between the previous public release 4.72 Build 7 and the latest release of 4.74.

If you are an end user, please refer to the **New Features** section of this document which summarises the major new features likely to be used by end users. The technical release notes are aimed at Accura system administrators, advanced users, and Accura support personnel.

Previous versions of release notes can be found in the Online Resource Area which can be accessed from the Accura Help Menu.

This document can be viewed anytime in Accura and Accura CRM from the Help menu – What's New window

In the text in this document:

- **FEATURE** refers to a new feature that was not available in the last public release.
- **CHANGE** refers to a change in software behaviour from the previous public release.
- **FIX** refers to a bug present in the previous public release that has been fixed in the latest release.



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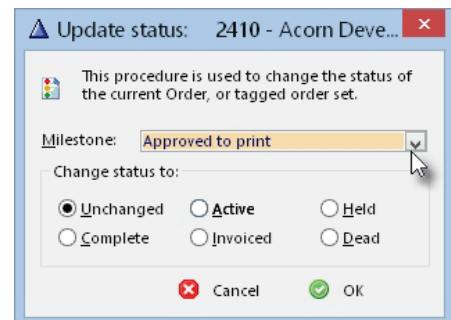
Major New Features in 4.74 Build 2

Milestones

The milestone feature has been improved upon further by adding more places where milestones can be set within the application.

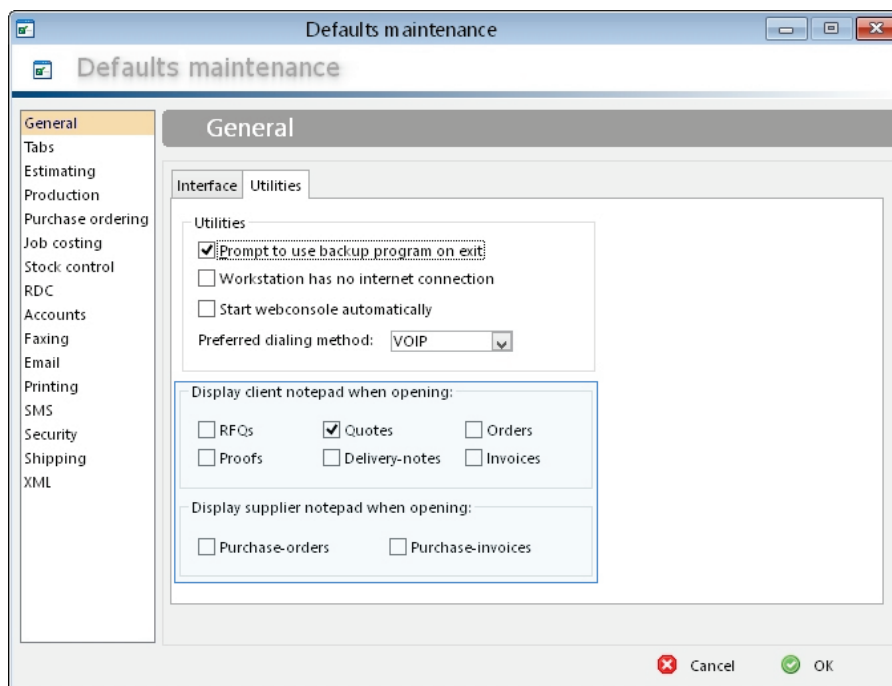
- Delivery notes and the delivery wizard now allow selection of a milestone, for example, you might want something like a “shipped” milestone applied to an order when the delivery note is raised. For the deliveries, the last milestone used is always retained.
- Change orders can also have a milestone. An example of using a milestone here would be to set the milestone to “Awaiting change approval” while waiting for the client to approve a change. The milestone for Change orders is NOT retained.

Milestones can now be set against orders from the View Orders browse without the need to open the order first. This can be achieved by right clicking on the order and clicking **Status**. This will display the **Update Status** dialog as previous versions did but now there is a milestone dropdown. By using this method it is possible to change the milestone value of many orders at once by tagging the relevant orders and using the **Update Status** feature described above.



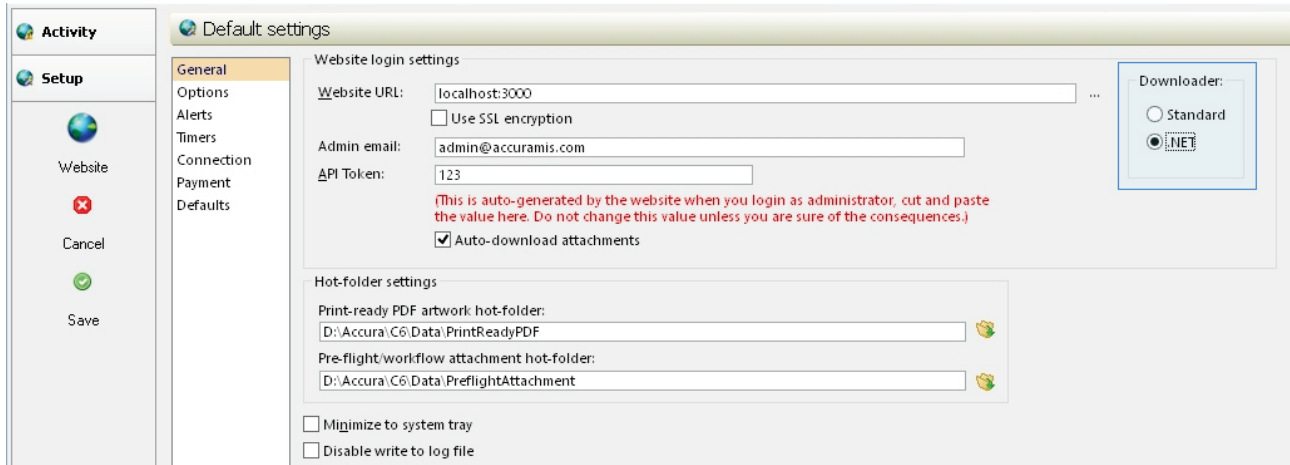
Pop-up Control

It is now possible to control for which transactions the client and supplier notepad will pop-up. These settings can be found on the Utilities tab of the Accura Defaults browse. These settings are Windows log on specific so users who do not generally have access to the Defaults settings can get an Admin user to log on to Accura and change these settings for them. Although this will stop unwanted client notes popping up, transaction related pop-ups will still appear.



Accura Online – Document Downloads

A new setting is available in the Web Console to use a new .NET Framework downloader application. The Default downloader can experience throttling back of download speeds on larger files on certain operating systems, particularly remote desktop server configured Windows 2012 R2. Users who do experience any problems with downloader becoming slow or stalling should use the .NET downloader instead. Please note, the .NET version installed needs to be 3.5 or greater.



The screenshot displays the 'Default settings' window in the Accura Online web console. On the left is a sidebar with 'Activity' and 'Setup' tabs. Under 'Setup', there are icons for 'Website', 'Cancel', and 'Save'. The main area is titled 'Default settings' and contains a 'General' tab. Within 'General', there are sections for 'Website login settings' and 'Hot-folder settings'. The 'Website login settings' section includes fields for 'Website URL' (localhost:3000), 'Admin email' (admin@accuramis.com), and 'API Token' (123). It also has a checkbox for 'Use SSL encryption' and a checked checkbox for 'Auto-download attachments'. A red warning message is present: '(This is auto-generated by the website when you login as administrator, cut and paste the value here. Do not change this value unless you are sure of the consequences.)'. The 'Hot-folder settings' section includes fields for 'Print-ready PDF artwork hot-folder' and 'Pre-flight/workflow attachment hot-folder', both pointing to 'D:\Accura\C6\Data\PrintReadyPDF' and 'D:\Accura\C6\Data\PreflightAttachment' respectively. At the bottom, there are checkboxes for 'Minimize to system tray' and 'Disable write to log file'. On the right side of the 'Website login settings' section, there is a 'Downloader' box with two radio buttons: 'Standard' and '.NET'. The '.NET' option is selected and highlighted with a blue box.

You can switch between the standard downloader types in the Setup – General area of webconsole



Major New Features in 4.74 Build 1

Accura Online

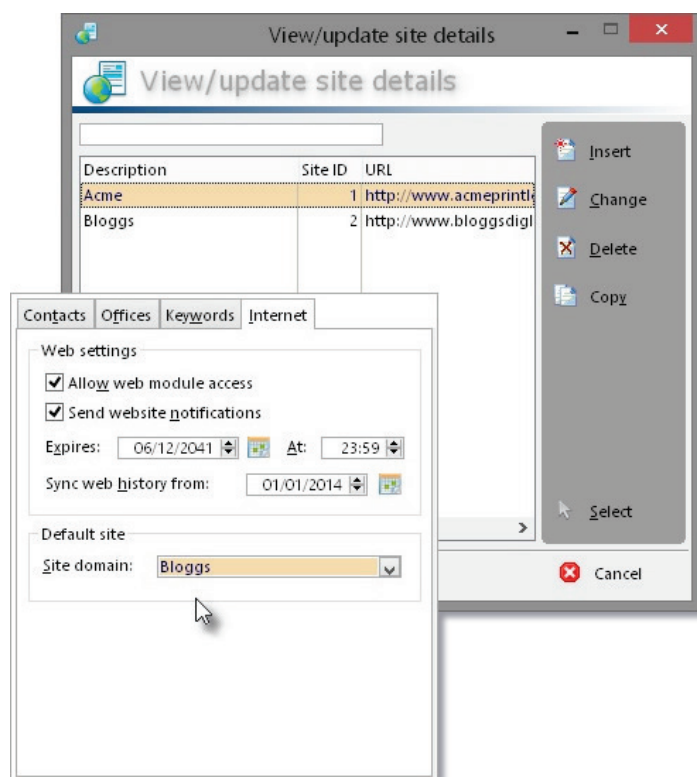
Domain Branding



Domain Branding is the prime new feature added to Accura 4.74 and Accura Online allowing you to effectively 'skin' your Online website with branding for **your** customers. For example, you may trade under two different names, "Acme Printing" and "Bloggs Digital Services". You want clients for each side of the business to log onto the website of the name they recognise. Using domain branding, this can be achieved.

In another scenario, you may hold an account for a client with many branches who order via Accura Online. Instead of the branches logging onto your default "Acme Printing" website, they log onto what looks like a website belonging to **their** parent company. However, all transactions come back to you, through the web console as usual.

The setup for each domain is done by Accura Support and they will require information from you such as custom banners, backgrounds and images, the title of the site, the email addresses that apply to this website and the domain name(s) you have registered for each different brand. For further information and a quotation, please contact our [sales](#) team.



Your domains can be found in Accura in the Web menu under **Sites**. Clients are assigned to the correct domain in their Client maintenance browse on the Internet tab.

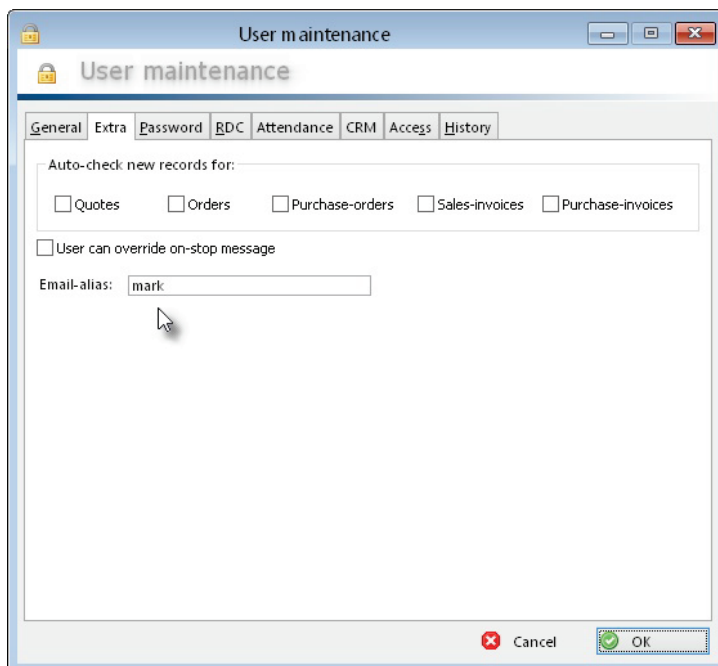


Domain Email Alias

If you require your emails from Accura to appear that they come from each branded domain then a small change will be required to your Accura user set up.

On the Extra tab there is an **Email alias** field. This field should be populated with the name that you want all your emails from the various domains to be prefixed with. For example, if you populated this with 'mark', then clients who are registered to domain 1 would receive emails from mark@acmeprint.com, clients registered to domain 2 would receive emails from mark@bloggsdigital.com and so on.

The default user email set up on the General tab should still be retained for fall back purposes.

The screenshot shows a 'User maintenance' window with several tabs: General, Extra, Password, RDC, Attendance, CRM, Access, and History. The 'Extra' tab is selected. Under the heading 'Auto-check new records for:', there are five checkboxes: Quotes, Orders, Purchase-orders, Sales-invoices, and Purchase-invoices. Below this is a checkbox for 'User can override on-stop message'. At the bottom of the tab is a text field labeled 'Email-alias:' containing the text 'mark'. The window has 'Cancel' and 'OK' buttons at the bottom right.

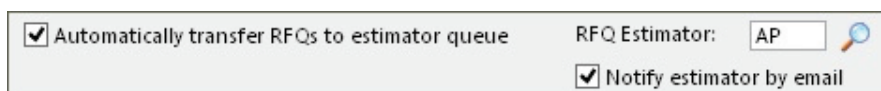
Template Selection for Blank Quotes

When a blank quote is processed in web console, there is now an opportunity to select in a template from the quote library is the estimator feels there is a suitable library quote. The manual option will allow the estimator to create the quote from scratch which was the previous default behaviour.

The screenshot shows a dialog box titled 'Use a template?'. It contains a question mark icon and the text: 'Do you want to use a template as the basis of the quote workings, or quote manually?'. At the bottom are three buttons: 'Template', 'Manual', and 'Cancel'. The 'Template' button is highlighted with a dashed border and a mouse cursor is pointing at it.

Blank Quote Processing

Web console now has an option to automatically send website generated blank quotes to Accura's RFQ (request for

The screenshot shows a section with two checkboxes, both of which are checked. The first checkbox is labeled 'Automatically transfer RFQs to estimator queue'. To its right is a label 'RFQ Estimator:' followed by a text box containing 'AP' and a magnifying glass icon. The second checkbox is labeled 'Notify estimator by email'.

quote) list. This is particularly useful when users operating the web console are not skilled estimators. Once in the RFQ list, the quote processing proceeds as normal. The quote request on the website will remain active until the RFQ is converted to a proper quote. There are also the options to nominate an Estimator that the RFQs will be assigned to and also to email the nominated Estimator.



Automatic Sign-ups

Accura Online now includes a feature to automatically process new user sign-ups if the user already exists in Accura. The user completes the sign-up as usual manner but when the sign-up is pulled into web console, if the email address matches an existing Accura contact, the sign-up will be automatically processed without the need for user intervention.

When a contact is processed in this manner, they are automatically web-enabled. If their parent client was not previously web enabled, the auto-signup will turn this on as well as turning on web email notifications. The client's default site will also be set to that of the branded site the sign-up was requested from (if applicable).

The image shows two overlapping screenshots from the Accura Online web console. The top screenshot displays the 'Default settings' section, where the 'Auto-process new signups (for existing clients)' checkbox is checked. The bottom screenshot shows the 'Sign up' form for 'Acme Ink', which is pre-filled with details like 'Alan Scott' and 'alan.scott@acme-ink.com'. The form also includes a 'Sign up' button and a 'Cancel' button.

Auto-signups can be switched on in the Set-up – Options section of web console.

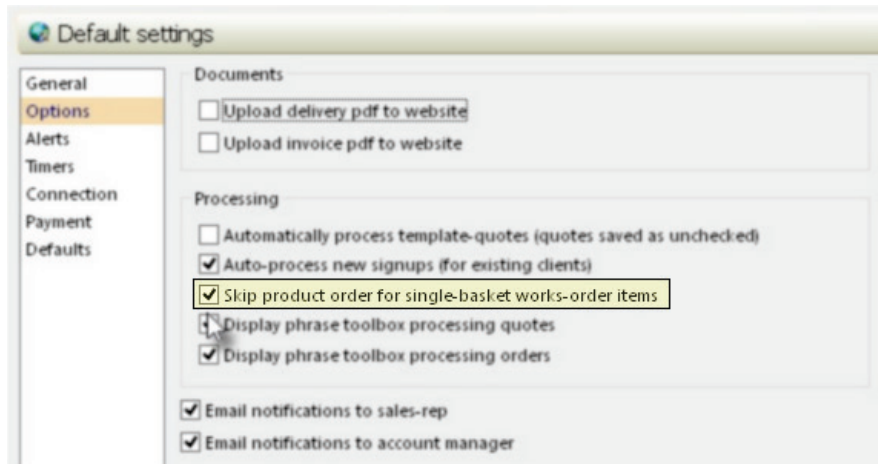
To avoid contacts being signed up with no-one in your company being aware, there are settings in web console to email the client's rep and or account manager. As a catch-all solution, there is also a new field in web console for an **admin email**. When this is populated an email notification is sent to this address after a new sign-up has been automatically processed.



Accura Online - Print On Demand

In order to reflect the quick turnaround nature of the print on demand aspect of Accura Online product orders, the way single basket items work has been streamlined to reduce extraneous paperwork and increase productivity.

In the **web console** there is now the option to **Skip product order for single-basket work-order items**. When this is switched on, when a web order is processed for a store product, it will produce a **service** order rather than a product order which then requires a works order to produce the actual product.



For a **non-stock controlled** product, the service order can just be fulfilled by raising a delivery note as you would normally. You can of course proof, make purchase orders and cost the order as you would any other service order.

For a **stock-controlled** product, once the service order has been completed, it will still need to be **transferred** into stock. Once the product has been transferred into stock, its status will be **Complete**. The difference now is that you can then raise the delivery note from *the same* service order to fulfil the original order.

Due to the complexity of online orders containing multiple products, multi-item orders will need to be processed using the same workflow as is currently in place.

Estimating

A **Sundry** step has now been added to the quote section wizard to allow for sundry operations that require a sections-based base quantity which will be especially useful for mailing houses and others that do mailing. 'Skip sundry' has been added to job types to allow users who don't require the Sundry step in the section wizard to omit this step.

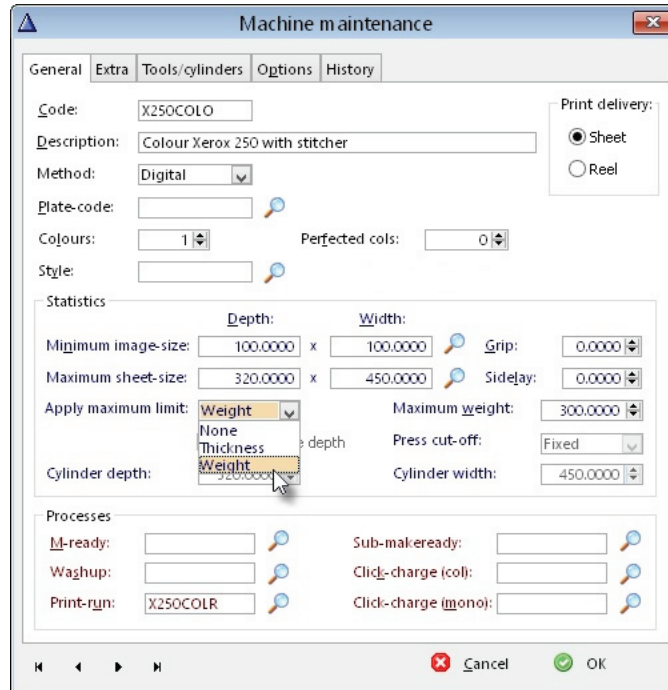
The **section wizard Description field** has been changed to enable ad-hoc section labels to be used instead of storing every entry as a list option. When entering a section label you will be prompted to add to the database and can say no if you don't want to store it for future use. If you press the browse button you can select, add, change or delete list option values.

The **Amend Quote Quantity Text** window has been removed and its functionality integrated with the main Statistics tab to allow better visibility of values and ease of use.



Material Weight and Thickness Validation

In order to improve support for digital and screen printing, presses now have a setting for maximum weight or thickness. Some presses can only run up to certain weights or thicknesses so this can be set in each machine. When presses are optimised in the quote section, each will be validated against the weight or thickness of the section material. If the material exceeds the press parameter, the press will not appear in the list of available presses.



The maximum limit setting has three choice, None, Thickness and Weight.

- None – If the press has this setting, no validation is performed against the material.
- Thickness – This setting is validated against the material's thickness field. (MTL:Thickness)
- Weight – This setting is validated against the material's weight field (MTL:Weight)

XML Integration (Beta)

In addition to the existing option for Order XML, Quotes can now optionally produce **XML files** to increase compatibility with systems such as Esko Automation Tools which send out samples based on quote data. Quote XML files can be turned on in Accura Defaults under XML.

There are also options for the export of Proofs, Deliveries, Invoices, Purchase Orders and Purchase Invoices XML files.

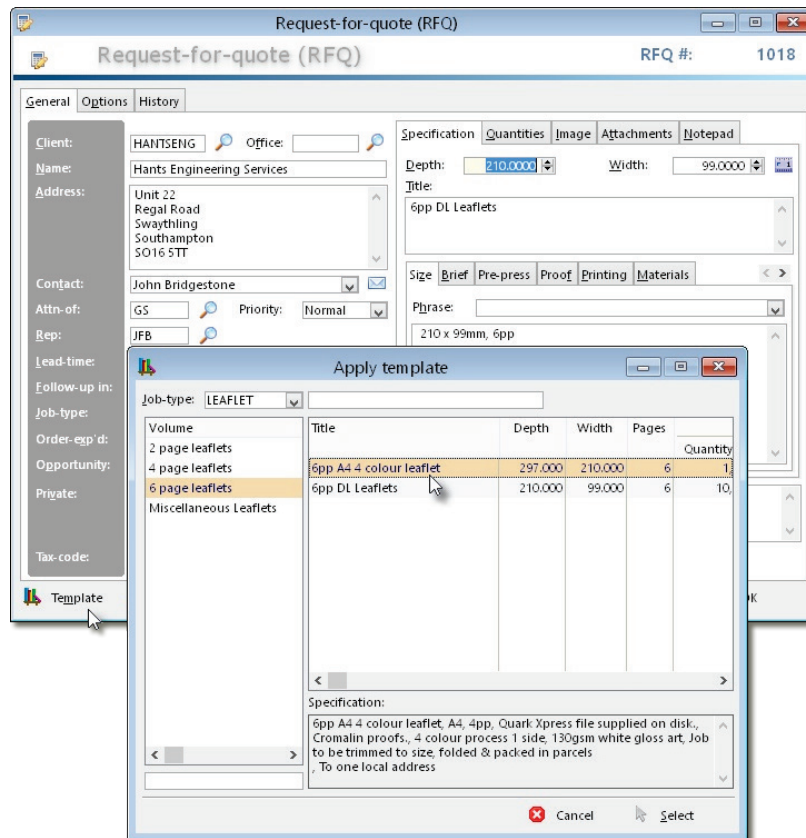
XML Export is currently a beta feature for customers who wish to experiment with XML compatibility with things such as workflow software. It is also featured to enable us, Data Design Services, to evaluate 3rd-party products.



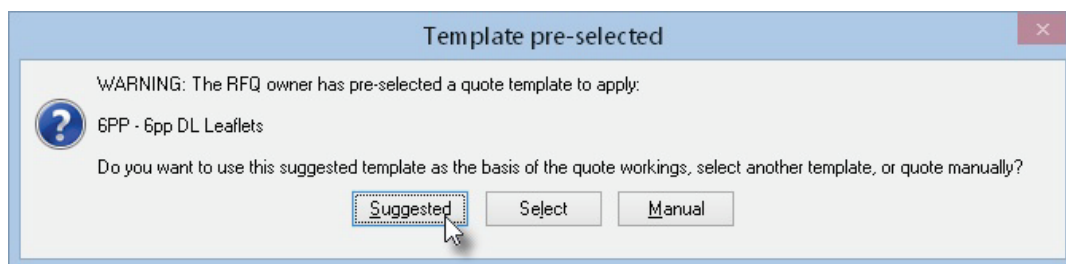
RFQs

Request for Quotes (RFQs) can now be linked to Quote Library templates. This will populate the entire quote specification, quantities, follow-up days etc. but not calculate sections and workings. This means time can be saved by populating the RFQ data quickly with little keyboard or mouse input required.

A quote template can be applied to an RFQ by clicking the Template button at the bottom left of the RFQ window and selecting the required template.



When the estimator comes to process the RFQ, he or she is presented with the options to apply the **Suggested** template, **Select** a different template or create a **Manual** quote. In all cases, the existing RFQ quote specification will be retained.

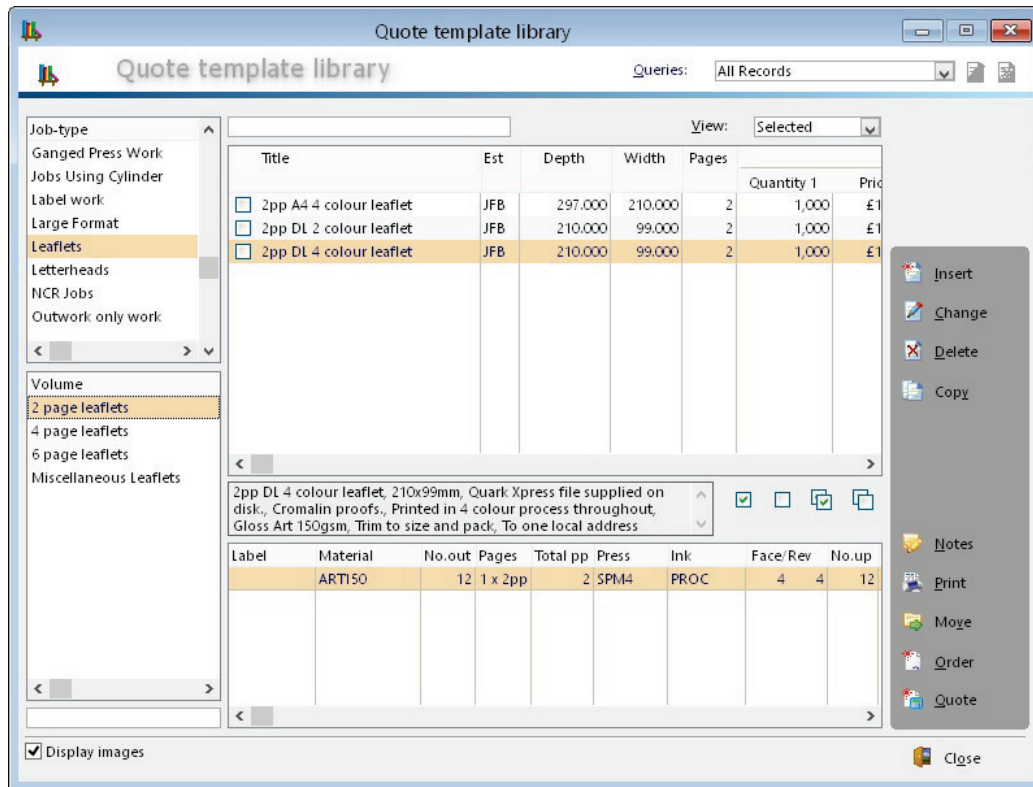


RFQs will now automatically send a **notification** email to the originator of an RFQ when it has been processed into a full quote.

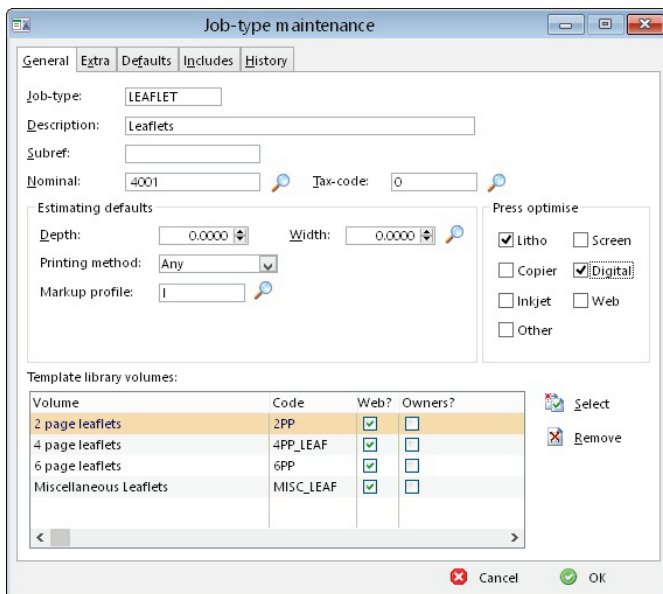


Quote Library

The **Quote Library** has been redesigned to allow library **volumes** to be linked to **job types** thus creating a nested structure to allow users to better categorise their library quotes. So instead of before where, for example, all your leaflet quotes could be assigned to just one volume for each variation, now you can have a leaflet job type with several volumes nested underneath for 2 colour, 4 colour etc.



Each job type can have an unlimited amount of volumes contained within, and each volume an unlimited amount of quotes. Anyone not wishing to use Job-types in this way can continue in the same way they always did.



There are two ways to assign a volume to a job type. The first is to open the volume, then select the job type you want it to belong to.

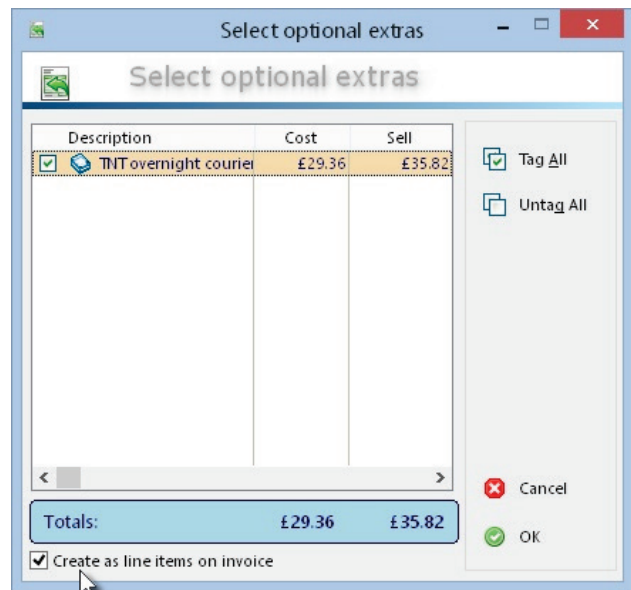
Alternatively, you can open a job type window (see left), click select then choose multiple volumes to assign using CTRL + click or SHIFT + click.



Optional Extras

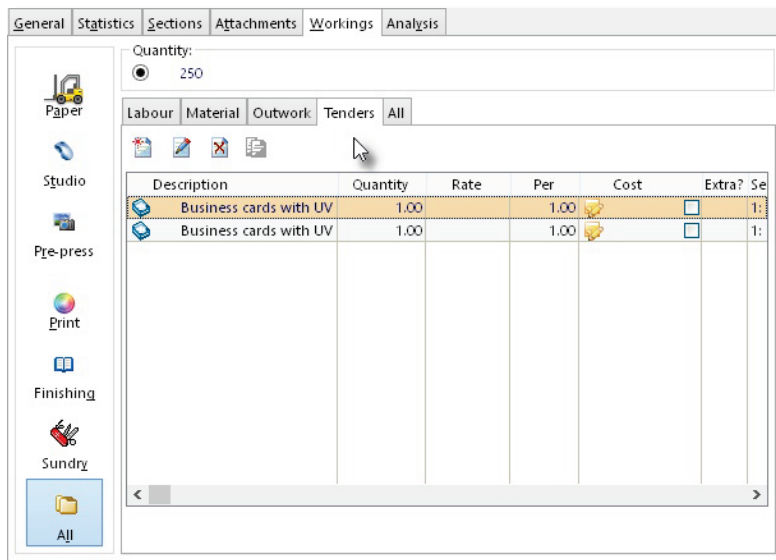
Quote/order Optional Extras now have the ability to be shown on an invoice as separate invoice items. For example, lamination may have been an Optional Extra on the quote and selected into the order when raised. Previously, the original quote will have been recalculated to include the optional extra and so the invoice price would include the optional extra.

Now when Optional Extras are selected into the order, there is the option to show the selected extras on the invoice as separate line items. The quote will be recalculated and the sell price pulled into the order as before but the extra will be shown as a separate line item in the invoice instead of being included in the original order price.



Outwork Tendering

The way **Outwork Tendering** within quotes has been completely redesigned to enhance its potential, especially for the print buying sector of the market but all area of the trade will benefit. This will require a change in working practice for existing users but the benefits should outweigh the small learning curve.



The first change is that Outwork that will require tender should **NOT** added to the Outwork tab as before. Instead, it should be added on the new **Tenders** tab using the **Insert** button as you would any other working.



On insert, you will see the new **Send tender/RFP** window and this is where you select in the operation you need to send out to tender and fill out the necessary details.

Supplier	Contact	Town	County	Postcode	Category	Email
<input type="checkbox"/> Howard Smith	Managing Director	Skate city		PO2 2PO	Merchant	gavin.spoo
<input type="checkbox"/> MODO	Managing Director	Southampton	Hants	SO24 2ED	Courier	gavin.spoo
<input type="checkbox"/> Parcellforce	Joe Posty	Fulham		SW2 3ER	Finishing	gavin.spoo
<input checked="" type="checkbox"/> Shiny Laminators	James Film	Inkton	Inkshire	INK1 2INK	Inks	gavin.spoo
<input type="checkbox"/> The Ink Company Ltd	Bobby Inky	Southampton	Hants	SO23 5GS	Merchant	gavin.spoo
<input type="checkbox"/> The Paper Company Ltd	George Riddle	Manchester	Lancs	MN23 4RT	Machinery	gavin.spoo
<input type="checkbox"/> The Tool Company	John Heath	BURY	LANCS	BL0 9AR	Courier	gavin.spoo
<input type="checkbox"/> TNT EXPRESS UK LTD	Bill Jones	Gloucester	Gloucs	GL34 W34	Outwork	gavin.spoo
<input checked="" type="checkbox"/> Trade Printers	Bill Dodds	West Sussex	BN13 1QG		General	gavin.spoo
<input type="checkbox"/> Ultrachem	Managing Director				Consumable	gavin.spoo
<input type="checkbox"/> XEROX (UK) Limited	Managing Director					

At the top of the window, there's a list of suppliers that you can filter by using the custom query wizard. You can then select the contacts for each supplier you require to submit a tender.

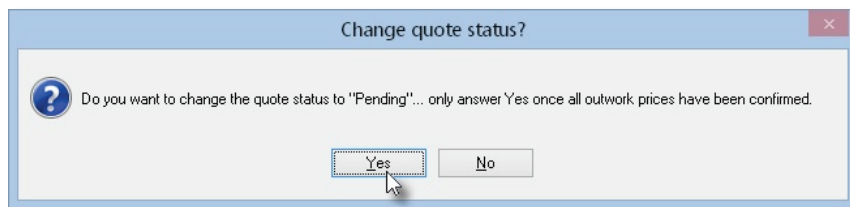
On the **Message** tab, you can define the content of your email to the supplier(s). For the **Additional message** text, there is the option of using the drop down **Phrase** list or library or by clicking the **Use Spec** button, you can pull the quote specification through.



A new merge token **[UserMessage]** has been added to the token list. If you want the additional message text to appear on your emails then you should add this new token to your default tender email template if you don't use the standard TenderEmail email template.

Your pending tenders will not appear on the Outwork or All tabs until they have been accepted in order to avoid confusion and list workings that are not yet needed. To do this, you populate the relevant Tender Outwork operation, fill in the price from your supplier, and tick **Include cost in estimate** and save the record.

If your quote has been set to Incomplete while you waited for the tenders to be returned, you will see the following message and choose which option you need.



The accepted tender outwork will now start showing on the Outwork and All tabs and be included in the overall cost of the quote.

Please read the Technical Release notes section [here](#) for changes made to **Outwork Tendering** in Accura 4.74. Build 2.

Milestones

The **milestones** feature has been added to and tweaked to improve usability. Milestones can now be manually selected into proofs, purchase orders, stock transfers and sales invoices. This has been added to improve traceability of orders as they move around the factory.

For each of these, the milestone is only selectable at creation of each transaction and will be greyed out when next opened. This is done by design in order to protect the integrity of milestones created by other processes further along the workflow.

Uses of these new milestone areas would be for example to be able to filter browses that can be filtered by milestones such a View Orders or the scheduling Planner. Sales invoice milestones have been added to help differentiate orders that are Held which could be held because they're on proof or because of the order's deposit or pre-payment settings.

In order to keep the links between milestones list options and the department they represent, milestones now enforce a parent department. This is because milestones that are used in stock transfers and purchase orders could belong to different departments and need to be linked to a department in order to work properly.



Stock Transfers

In previous versions, there was no clear way of handling transferring a works-order quantity into stock that was below the original order quantity. Now, if you have to transfer in to stock less than the order quantity, there is a **Force-close order** checkbox. This will do two things: the first is to post a write off stock activity to take the shortfall of the On Order total. Secondly, the works order status will change to the correct status.

Job-no	Stock-code	Quantity	Warehouse	Location
✓ 2,208	VAN_BC_OP	250		

Transfer details

Stock-code: VAN_BC_OP

Quantity: 245

Warehouse:

Location:

Pack/poll ref: <auto>

☒ Force-close order

☐ Product
☐ Material

Should you need to force close a works order **after** the stock transfer for any reason, for example, the shortfall will not be made up with a reprint or the original transfer had erroneously not been closed, the works order can be closed off using the Stock Close off functions to zero out the on order.

REMEMBER! Closing off these works orders will prevent further stock transactions!

In addition to the new milestones for stock transfers feature, it is now possible to send notification emails to internal user so they are aware stock has been transferred and is available to fulfil any related product orders.

Default warehouse:

Assign milestone: Transferred to stock

☒ Email stock transfer notice

Email notification to

☒ Owner ☐ Manager ☐ Stock-room ☒ Dispatch

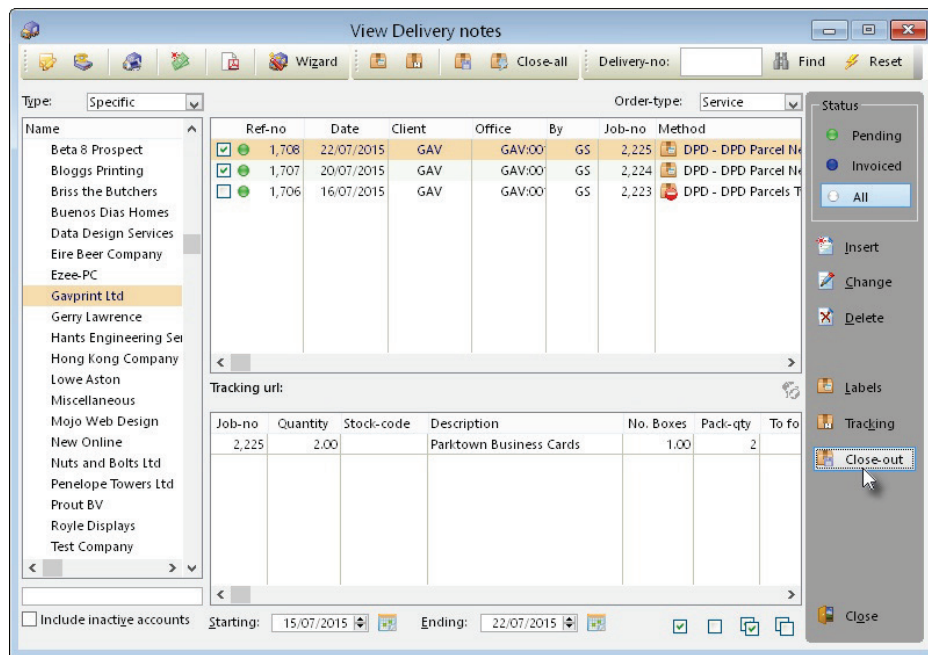
You can select one or more of the order's **Owner**, the order's assigned **Manager**, the **Stock-room**, which will send the email to the assigned paper department manager or to **Dispatch** which will sent the email to the finishing department's assigned manager.



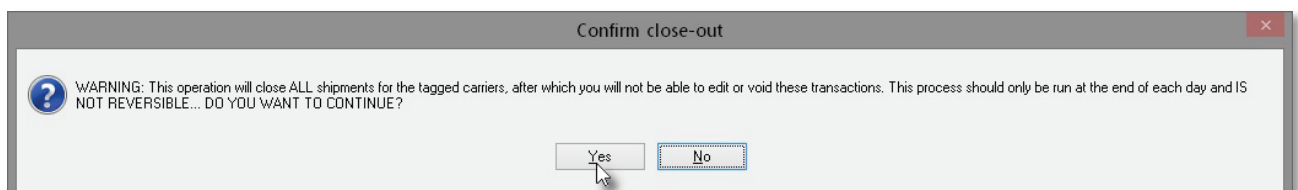
Carrier Integration

To increase the usability of the iAbol carrier integration feature, a **close-out** facility has been added. Previously, users would have needed to log on to the iAbol portal to process their daily close-out of booked deliveries. Now, this can all be done within the Accura **View Delivery Notes** browse, quickly and easily.

There are two ways to close-out delivery notes that have been booked in with your carriers. This first is to tag individual delivery notes and click the Close-out button on the right or in the View Delivery notes main tool bar. This will then process the tagged delivery notes and download a manifest PDF from the carrier. These PDFs can be found in the Data\Deliveries\Manifests folder on the Accura server.



If you have deliveries to process for more than one carrier, you can use the **Close-all** option in the View Delivery notes main toolbar. When you open the Close all window, select the carriers you want to register a close out with by



SHIFT + click or CTRL + click. Then you press the close out button to process the booked deliveries for the selected carriers. This process is NOT reversible so please ensure you are certain before confirming the warning.



Interlink Express has been added to the list of couriers available in the Carrier Integration feature (UK Only).



RDC

Purchase order functions can now be accessed from within the **Remote Data Capture** console (where installed). This allows shop floor staff to view purchase orders for reference or even create purchase orders where permissions allow.

Security settings for using purchase ordering in RDC are thus:

- PO:General - Access to the module in View Only mode.
- PO:Update – Allows creation or editing of purchase orders and status changes
- PO:Export – Allows checking of purchase orders

These permissions should be set for the user who is the security user set for an RDC workstation.

The **stock transfer** function is now also available from the RDC console to allow shop floor staff to transfer service and works orders into stock (where installed).

To enable this function, the security user for the RDC station should have the STK:Update security door granted.

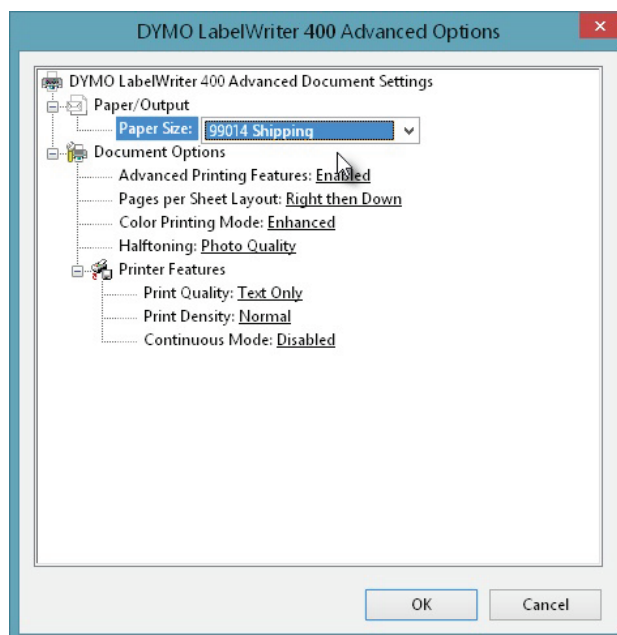
Label Printer Support

Thermal label printers can now be used accurately from Accura due to a change in the way Layout Designer handles size. Now, Layout Designer is not restricted to using predetermined sizes but can use any size a printer will support. This means thermal label printers, such as those made by **Dymo** and **Zebra**, can be supported and will work accurately.

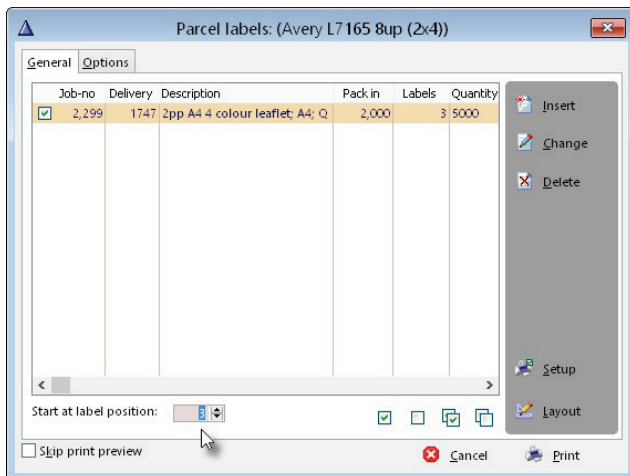
Specifically for Dymo printers, the label size to be used needs to be set up in the printer properties.

On a Windows 8 PC, you would need to go to **Control Panel – Devices and Printers**. In here, right click your Dymo printer and select **Printer Properties**. On the **General** tab, go to **Preferences** and then **Advanced**. Under paper sizes, you will see the sizes the Dymo printer driver supports, choose the one you require or the one that's the closest in size to the labels you have.

If you need to use different label sizes for different label types, i.e. address labels, parcel labels etc., you will need to select the paper size in Printer Properties **each time** you change label size! The Dymo print driver ignores the settings from Accura and this is something *we have no control over*. Other label printers such as Zebra may not work like this and the label size can be changed in the Accura print setup dialog.



Sheet Labels



A new label position field has been added to label printing dialogs such as parcel labels, address labels etc. By using this setting, when using Avery-style label sheets, you can specify on which label printing will commence meaning wastage of label sheets is reduced.

Attachments

Clients and **Suppliers** can now have **attachments** saved against them. Attachments are stored on the Accura server in Data\Attachments\Clients or Suppliers folder. Each attachment will be prefixed with the client or supplier field.

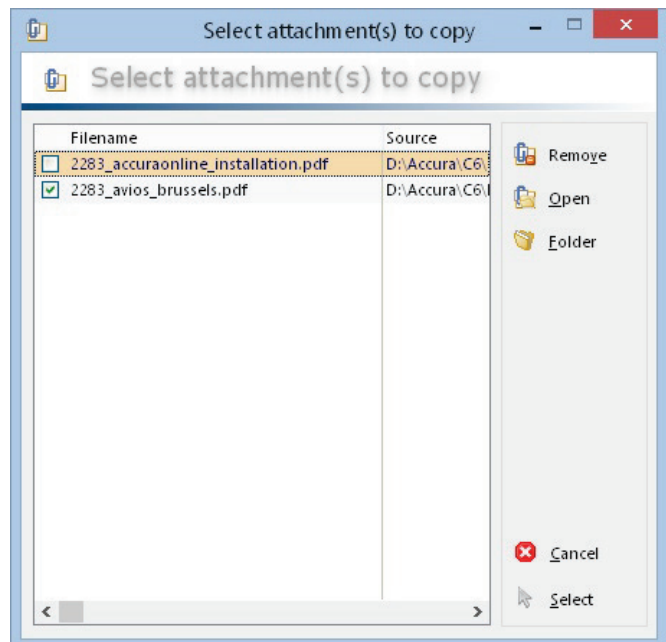
Client and **Supplier offices** can also have attachments. These are stored on the Accura server in an Offices folder under Data\Attachments\Client or Supplier

Quote and **Order** attachments have a new checkbox setting that determines whether individual records are copied forward when quotes or orders are copied. To support this new feature, there is a new default setting for both Estimating and Order Processing to set the initial status of attachments to yes or no.

Quotes with attachments when converted to an order will now present a dialog to show all attachments and allow users to specify which attachments are copied forward to the order. There is now also a new setting in Estimating Defaults –**Copy quote attachments to orders**. When this option is unchecked, quote attachments will **not** present the Copy Attachments dialog, regardless of the copy setting in each individual attachment.

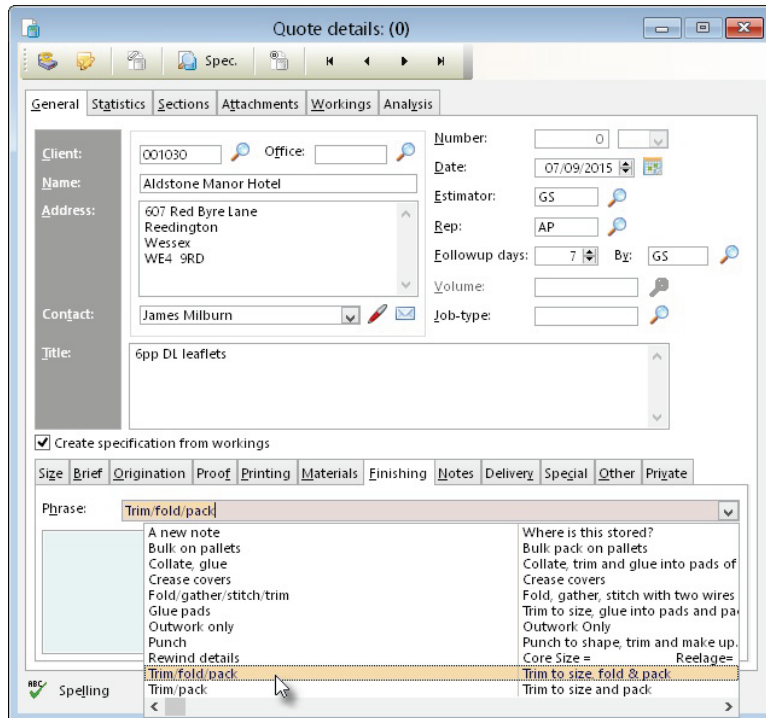
Attachments can be viewed from most major browses e.g. Orders, Quotes, Clients/Suppliers by right-clicking on the record and selecting Attachments.

From the View attachments browse attachments can be added, removed, printed, emailed or re-downloaded (for orders/quotes only).



Miscellaneous New Features

It's now possible to **email a contact** from within RFQs, quotes and orders by clicking the **envelope icon** next to the contact name. This will make it easier for estimators, CSRs and sales staff to email a contact should they have any queries on the customers quote/order.



A **phrase drop list** has been added to the quote and order windows to allow more instant selection of phrases. This will allow users to use the phrase library without having the phrase toolbox on screen thus saving on screen space which can be at a premium on smaller monitors or in the default sized web console.

Email broadcasts now have the ability to use and store separate SMTP server details from the usual ISP/Exchange settings. This enables you to use a bulk mailing service such as Mandrill to handle large e-shots and e-blasts without being penalised by your usual SMTP provider for breaking anti-spam rules.

Default field values now have added functionality to be able to rename controls and tabs without the need to use translations. One use of this could be to rename quote and order tabs based upon the job type selected. It is also possible to disable certain controls and tabs. Further details on this new feature will be available in the "How to Configure Default Field Values" sheet available in Online Help.

Client and **Supplier** offices can now have notes stored against them, just as their parent records can. However, office notes will **not** pop-up like client and supplier notes do; they are purely for references purposes at this point in time.



Changes between 4.74 Build 3 (06 April 2016) and 4.74 Build 4 (11 April 2016)

General

- FIX:** Resize issues have been addressed in the generic View Attachments browse.
- FIX:** Office label dialogs were using a different font to the rest of Accura.
- FIX:** Spam testing was missing from the supplier email broadcast wizard.
- FIX:** The supplier email broadcast was fundamentally broken by the Send button not responding.
- FIX:** Using the Use custom email settings control in the supplier email broadcast wizard would make the wizard step back a page.
- FIX:** The keyboard locator field was being populated with the name of the currently highlighted supplier in Purge Suppliers.
- FIX:** Resize issues have been addressed in the supplier broadcast wizard.
- FIX:** The Purge quote date range label was incomplete.

Tables

- FEATURE:** Attachment functionality has been added to raw materials to complement a similar feature for stock materials and products.

Stock

- FIX:** Resize issues in the Client maintenance - Select products browse have been addressed.

Accura Online

- CHANGE:** There is a new "version" field in the web console UI. This is the help support the forthcoming Accura Online Version 5. This setting should NOT be adjusted by end users unless under the advice of Accura support.



Changes between 4.74 Build 2 (18 March 2016) and 4.74 Build 3 (06 April 2016)

General

FIX: Pop-up notes created from within quotes or orders would not pop-up when the parent record was reopened. In addition the notes icon would not show if they were created in this way. Previously effected notes will NOT be fixed during the build 3 upgrade.

Outwork Tendering

CHANGE: When entering a price into a Pending tender working, if "Include cost in estimate" was not checked by the user, a prompt was displayed to "Accept costs". Clicking yes to this prompt would also change the quote status to Pending regardless of the status of other pending tender requests. Now in this scenario, the user will be asked if they want to include the cost and then if they want to change the quote status.

FIX: Re-tendering an outwork working for multiple suppliers in a copied quote would only create the one tender working.

Stock Control

CHANGE: When re-calculating a quote template that had linked products, previously you would only be given the option to update the product's cost pricing. Now the user has the option to update the Cost, Sell, Both or None. NOTE: This will only apply to products whose pricing method is set to Quote.

FIX: When calling the Select Material browse from the Stock Issue window, the "display items for current order only" filter was greyed out.

CRM

FIX: Activity profile Invoices tab was not using the default history to view value.

Accura Online

FIX: Order attachments flagged as artwork would suffix the job number with 0 when copied into the Preflight hot folder.



Changes between 4.74 Build 1 (20 January 2016) and 4.74 Build 2 (18 March 2016)

General

FEATURE: XML exports have been expanded to generate XML files for stock materials and products. The XML file will update when any stock rebalance is triggered in the software.

FIX: The default TenderEmail.txt file contained HMTL coding that was making MAPI emails appear corrupt.

Accura Online

FEATURE: It's now possible to disable the uploading of proof letters and order acknowledgment documents in the Web Console application settings to prevent them uploading to the website.

CHANGE: Manually downloading attachments would previously assign the first download as the order image. This behaviour has been changed as this could mean a large file being re-uploaded to the website reducing bandwidth unnecessarily.

CHANGE: When there are multiple order attachments flagged as Artwork, Accura will copy these into the Preflight folder with the naming convention <ordernumber>_<incrementing number>.<file extension> i.e. 2421_1.pdf, 2421_2.pdf etc. This will mean that as there can only be one XML file for order 2421, the artwork files will require some user intervention.

FIX: Web enabling a contact in the sign-up wizard would also web enable other contacts that use the same email address. This would cause problems in the Online database where contact accounts must use unique email addresses.

FIX: Updating a web enabled contact from the contact tree in View Clients would not create a contact:update webtask to update the SQL database until the client had been opened and saved.

FIX: Deleting a web enabled library quote was not setting a web task to remove the template from the Online database resulting in inconsistent data.

FIX: eDoc artwork was not being copied from a product order to it's child works orders. Now the product order will have the eDoc documents attached to it and each one will also be attached to the relevant works order spawned from the product order. This will also be replicated in the Print Ready folder.

CRM

CHANGE: Quote Number, Quantity and Price columns now show in the CRM To Do list to help users prioritise Quote Follow-ups. Only the first quantity and price are displayed for each record.

FIX: The Quote Revision was non-functioning in CRM Activity Profile on the Quotes tab.

FIX: CRM Users who had the security permission 'View Other Users CRM Data' disabled were still able to see invoices for other users.

Estimating

CHANGE: If a tender was created for a supplier contact that did not have an email address, the tender dialog would close. Now the email is created so the user has the opportunity to select a different user with an email address.

FIX: A combination of copying and cancelling quotes could result in duplicate quote numbers.

FIX: Press perfecting options weren't validating correctly on the reverse colours setting in the section wizard.

FIX: An image attached to an RFQ was not pulling through to a quote when a library template was selected.

FIX: Job type auto-includes that were not marked as Optional were not being pre-ticked when the job type was selected into a quote made from an RFQ



FIX: Library quotes would seem to disappear until the user clicked on the 'Any' job type category after processing Quotes or Orders.

Tendering

CHANGE: Notes created with an outwork tender will no longer pop-up when opening the parent quote. Each tender working's details can be seen by right clicking the workings and selecting Notes. This change was made to reduce the annoyance caused by pop-ups throughout the software.

CHANGE: To enhance the changes made in 4.74 Build 1, it is now possible to "Re-tender" an email tender to enable resending emails to suppliers and thus adding a new supplier to the list of tenders.

CHANGE: You can now use legacy outwork operations to use as tenders. On the Outwork tab of workings, the existing item required for a new tender should be highlighted. When the "Re-tender" button is pressed, the Tender options\email dialog will open and once saved, the outwork item will move from Outwork to the Tenders tab.

Order Processing

CHANGE: If the Quantity field contains non-numeric characters on a non-quoted service order, the user will be prompted to check that the Quantity Value field on the Delivery tab contains the correct value. This because Accura cannot translate text such as "250 each x 2" logically to a number and the Quantity Value field can contain what seems like spurious data.

CHANGE: Accura will now enforce a Quantity Value of at least 1 to prevent users changing the figure to 0

FIX: Quantity value was changing when the quantity text field was altered in a quoted order.

FIX: The delivery client in an order was not allow selection of a client other than the invoicing client.

FIX: The phrase library was not linking with the Packing\Delivery notes text field on an Order's Delivery tab.

Delivery Notes

FIX: The order browse for a delivery note with the order type of Product was defaulting to Service.

Purchase Ordering

FIX: Purchase orders with a negative quantity were not showing in Stock Receipts thus preventing stock returns to suppliers.

Invoicing

CHANGE: Delivery note selection browse has been improved by only showing delivery notes pertaining to the invoicing client and the addition of a date range filter.

FIX: The order browse for a delivery note with the order type of Product was defaulting to Service.

Stock Control

FEATURE: Stock material and product items can now be manually re-balanced en masse by tagging records in the relevant browse and clicking the Balance button in the toolbar.

RDC

FIX: The RDC console would not resize to the full app frame under certain circumstances.



Changes between 4.72 Build 7 (22 June 2015) and 4.74 Build 1 (20 January 2016)

General

FEATURE: Data variables can now be added directly in Accura email templates without the need for creating a new merge token. Fields enclosed by braces {<fieldname>} will not print on emails if their data value is invalid for that email type. Examples – {CLI:Notes}, {Email:UserMessage} etc.

FEATURE: A 'Send to' function has been added to the Phrase Library to enable easier revision of the library.

FEATURE: The new press weight/thickness limit feature is supported in the list of available fields for the machine list layout type. Maximum limit and Limit value have been added to the standard machine list layout.

CHANGE: The Spanish translation file has been expanded on. Almost 90% of the UI has now been translated.

CHANGE: Client 'type' filters will now remember their previous settings rather than always reverting back to the default.

PLEASE NOTE! This new feature could impact on the speed of some browses if your history to view date spans a wide time scale. For example, if you open your Quote browse when the client filter is set to Any and your history to view is set to 9999 days, the window will take longer to load due to every quote for every client and prospect will be called into the browse.

CHANGE: A confirmation is now required when deleting attachments from quotes and orders.

CHANGE: The field ORD:TimeIn has been added to the list of fields available in both the order and job costing report wizards.

CHANGE: The client SDAYS merge field used in the Word templates is now obsolete and has been replaced by the client field STERMS. The Accura Mailmerge Master Field List has been updated to reflect this change but all custom Word templates will need to be updated manually.

FIX: Reports generated by the report wizards could have data lines missing when printing on US size paper.

FIX: Using a CC merge token that used an appearance condition would put a rogue semi-colon when the condition = false and the client was set to CC rep and/or manager in emailed documents.

FIX: Email template designer would hang the software if the Preview tab was selected.

FIX: Running a window reset from the Import Export application would close the Actions pane meaning the app would need restarting to restore it.

FIX: Copied quotes and orders would not allow deletion of any copied attachments.

FIX: Database files created by Accura for use in client mail merges could be different depending on where the database was triggered from.

Estimating

FEATURE: Labour and material quote workings will now calculate a sell value based on the mark-up profile.

FEATURE: Quote workings for materials and labour will now calculate cost and sell prices based on the current mark-up profile in a similar way to the existing functionality of outwork workings.

CHANGE: The Quote Analysis report has been changed to list workings by section sorted by department. Global workings are listed by department.

CHANGE: Quote section wizard PP field has been altered slightly to support wide format quotes. A 'single sided' option has been added which will show throughout the software as a 1pp. The drop down list 2pp has been changed to be called double sided which is purely a cosmetic change.

CHANGE: The Quote workings tab has been redesigned to increase the amount of usable space.

CHANGE: Default TenderEmail templates have been updated to include a new [UserMessage] token which will insert the additional user text from an outwork tender

CHANGE: Quote PDFs would be regenerated when sending a quote follow-up meaning if a non-default layout as used, the PDF could be on the wrong layout. Now, if a PDF for that quote exists in the Data\Quotes folder that will be used as the attachment otherwise it will be automatically regenerated.

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CHANGE: Mark-up selection when creating quotes from RFQs has been made more intelligent.

CHANGE: RFQ attachments now allow output options in a similar way to quote attachments.

FIX: The workings database field 'sectionno' could contain an incorrect value.

FIX: Labour and materials linked to presses and materials as 'tablelinks' would not flow through to quotes if they were set to Prompt. This fix may have been applied to affected users in a 4.72.7 'hotfix'.

FIX: When the order of quote statistics was set to WidthDepth in Defaults, the specification text created when 'Create text from workings' was enabled would list the dimensions in the wrong order.

FIX: If a standard size was used in a job type and the size was subsequently deleted, the job type's size, although the same as before, would not be pulled into quotes or sections.

FIX: Material overs calculations could be erroneous when using a press without a plate code such as a digital press.

FIX: A quote's mark-up profile could not be changed to another profile that used a different mark-up method.

FIX: If during the creation of an RFQ you chose to preview the output PDF, an RFQ number would be assigned. If you then cancelled the RFQ, the number wouldn't roll back. This meant that a seemingly valid RFQ could be printed but not stored. The next RFQ would then take the same number.

FIX: The 'Extra' buttons on the Workings right-click menu would not validate on records that were auto-includes.

Tables

FEATURE: A thickness filter has been added to the Options tab of View Products.

CHANGE: To help support press material weight\thickness validation, the Thickness filter has been moved to the Material tab of the material and stock database browses.

FIX: The number of perfected colours was not showing on the default machine layout. Customers who have custom machine layouts should select MC:PerfectedCols on the layout to replace the existing field.

Order Processing

FEATURE: Order item notes window now has a phrase drop list. New entries can be added directly from this window. Edits or deletions should be done from the Phrase Library itself

CHANGE: Order – Extra tab has been removed in favour of sub tabs on the General tab

CHANGE: Order deposit amounts will now not be overwritten if the related quote is amended and pulled through to the order again.

CHANGE: Requisition button in Order P-Orders tab has been given an icon to make it more obvious that it is actually a button. It has also been added to the main order details toolbar for added convenience.

CHANGE: A 'pads of' field has been added to the order UI for customers who created manual padded quotes. Users who do this should set the Quantity to the amount of pads (i.e. 20 pads) then the 'pads of' field to the correct number (i.e. 50). This will ensure that manual pad orders that are numbered will calculate the ending number correctly.

CHANGE: Changing the 'from address' in a proof email would not change the email used by the proof response button tokens. This is unfixable due to the token code being executed at the time of the email's creation. To work around this, a 'Response address' field has been added to the Options tab of the proof printing window. This means proofs can be send from and responded to a generic departmental email address for example rather than a studio user's personal email.

CHANGE: The 'picture' for the ORD:UserNumber1 and 2 fields have been changed to show 2 decimal places when added to order related layouts. This field can actually support up to 4 decimal places but users can amend the picture at their own discretion should they want this many decimal places to print.

CHANGE: There are now separate settings in View Orders – Options for grouping deliveries and invoices where previously both transactions were controlled by one setting.

CHANGE: Order contacts now validate on whether the contact is still Active or not and will force reselection of a contact if invalid.

CHANGE: An order's current department can now be shown in reports generated from the Order wizards by selecting the field DPT:Name.



- FIX:** The calculations for numbering on pad orders have been completely re-written to be more accurate.
- FIX:** The 'Skip Print Preview' setting was not being retained in Delivery Note, Invoice and Proof printing dialogs.
- FIX:** Changing the client in an order would spawn a warning that the quote hadn't been checked even if the client didn't have checking enabled.
- FIX:** View Notepad button in an order would not open the pop-up notepad.
- FIX:** The order items tab didn't update after a note had been added to an order item making look as if the note hadn't been added.
- FIX:** Creating purchase orders from within an order wouldn't allow tagging of order items and so the PO automation would break.
- FIX:** Pulling attachments through from a quote to an order would leave a copy of the attachment in the Attachments\Orders folder prefixed by the quote number.
- FIX:** Order user defined fields would not populate when the contact table was called for in a default field value.

Delivery Notes

- FEATURE:** An Options sub-tab has been added to the carrier tab in Delivery Notes with the option to enable a debug mode for use by Accura support to diagnose any potential problems with a customer's setup.
- CHANGE:** The Delivery code browse on the Carrier tab of a Delivery Note will now only list outwork items that have the "Is Delivery Charge" checkbox ticked
- FIX:** Booking a carrier service by selecting the carrier and service on the Carrier tab wasn't creating the booking correctly.
- FIX:** Booking carrier services in individual delivery notes in the Deliveries Wizard was processing the delivery note records with no number.

Proofing

- CHANGE:** The proof External URL has been moved from the Extra tab to the General tab. In addition, this field now allows selection of user configurable 'list option' values.
- CHANGE:** The default proof email templates have been have been reworded and now also show the proof return-by date.
- CHANGE:** Email proof response icons have been redesigned with a more 'modern' feel.

Invoicing

- FIX:** Invoicing a delivery note that had an extra delivery charge wouldn't give the option to add the extra to the invoice.

CRM

- FEATURE:** A number locator has been added to the Quote and Order tabs in the Activity Profile browse to enable CRM users to easily find quote and order records.
- FEATURE:** A Milestone column has been added to the Orders tab of CRM View Activity Profile window.
- CHANGE:** CRM Appointments and Tasks created for a user for another user will sync into the assigned person's Outlook when an Outlook refresh is triggered from CRM. This is dependent on each user's CRM synchronisation settings.
- NOTE:** If a user moves or deletes an appointment in their CRM for another user, this will not be synced to Outlook (as it can't). Thus you can have appointments that have disappeared from CRM but still exist in Outlook. The only way to deal with this is that once the appointment is made for a user, he/she must be the only one that moves/deletes them.



- FIX:** Some quote related buttons were not working in the CRM Activity Profile Quote toolbar.
- FIX:** Some buttons on the Activity profile window did not behave correctly when the window was resized.

Purchase Ordering

- CHANGE:** Creating purchase orders from the View Materials window has been improved by grouping materials by supplier creating one purchase order per supplier.
- CHANGE:** Purchase Order Status Report has been optimised to gather data quicker across slow networks.
- FIX:** Users that had been denied permission to check Purchase Orders were not denied access from Checking within the PO itself.
- FIX:** Written-off PO items were not displaying the Write-off status icon.
- FIX:** Tagging multiple items in a Purchase Order requisition would change the rate if the PO item was opened and the quantity changed.
- FIX:** Raising a PO for multiple order items with the same code i.e. ADHOC would add all the items together as one PO item.

Stock Control

- FEATURE:** Stock Transfer window shortcut is available in the View Orders window through a toolbar icon and the right-click menu. The shortcut will only be available if the highlighted order has a stock code assigned.
- CHANGE:** Orders that had been closed for stock transactions would previously still show in the Stock close off browse. Now orders will be removed from this browse once they have been closed off.
- CHANGE:** The View button on a product's Purchasing tab will now open the purchase order or work's order depending on the re-order method of the product.
- FIX:** Works orders for non-stock controlled products were not creating fully formed item entries meaning they were not visible in the product order purchasing tab or the product's purchasing tab.
- FIX:** Purchase Orders created from the stock requisition browse wasn't using the suggested quantity as the amount to order in the PO item.
- FIX:** The OK button in the stock close off window wouldn't resize correctly with the window.
- FIX:** Some of the filtering and filter reset wasn't working when selecting products within a client.
- FIX:** A single order could be added to the stock transfer list if the Defaults tab had focus.

Job Costing

- FEATURE:** The Job Costing Profit Summary report now has the option to include non-costed orders where the profit is 100%. This means scenarios where service orders raised for products and not invoiced and thus show as a loss are then equalled out by the subsequent product call-off showing on the report as profit.
- FIX:** Material batches could incorrectly report issuing of more material than allocated if more than one issue existed against the same allocation.
- FIX:** Time sheet window would not display the browse labour table correctly for the first entry of each time sheet.

Scheduling

- FEATURE:** The order Rep field has been added to the Scheduled/Unscheduled pane of the Planner
- FEATURE:** The Scheduling Planner now features a milestone filter for the browse orders pane.



RDC

FEATURE: The way RDC is licensed has been altered to match the way CRM is now licensed. All core Accura users will now be able to access RDC (including Time and Attendance if purchased) without taking an RDC licence. RDC licences are still issued in the same way for factory workstations using the same number as before.

FEATURE: Order selection browses in RDC now have both Milestone and Query Wizard filters.

Time and Attendance

FEATURE: The Time & Attendance report now has the option to be presented as a summary report.

CHANGE: It's now possible to add an attendance record in the event of an RDC operator forgetting to log in or log a break. Breaks cannot be created unless there is a parent attendance record for that date.

CHANGE: A user's attendance related labour codes will be suppressed in the RDC activity window to help prevent logging attendance information in an incorrect manner.

Accura Online

FEATURE: The date and time quote, order and contact requests are now displayed in web console.

FEATURE: Sales rep and account fields have been added to the web console quote and order request browses.

FEATURE: It's now possible to select a specific currency in the Web Signup wizard. Previously this would have been automatically set by the client's country currency.

CHANGE: Web console Quote and Order browses now display the client name rather than code.

CHANGE: Web task comments field has been increased in size to store more characters.

CHANGE: To give Accura Online artwork downloads, order attachments and order XML generation better compatibility with 3rd-party software such as Enfocus Pitstop Server, changes have been introduced to the naming convention used and file location:

- Attachments will still be stored in the Data\Orders\Attachments folder as before but when they are copied to the pre-flight/workflow hot-folder they are simply given the <jobnumber>.file_extension filename if they are a) downloaded PDFs or b), manually attached files where the Artwork flag is set to true by the user.
- Print ready artwork PDF files coming from the optional eDoc module will also be stored as before in the Data\Orders\Attachments folder as well as the eDoc hot-folder. The hot-folder iteration will be given a <jobnumber>.file_extension file name and order XML files will now also be saved to this location.
- When Accura generates its order xml, this generates as the job-number in the XML output folder as before but also copies to the pre-flight/workflow hot-folder as <jobnumber>.xml. Pitstop and others look for the <jobnumber>.xml and <jobnumber>.pdf as a matching pair and in one folder only.

CHANGE: The auto-includes window will open on the Workings or Analysis tabs when processing a web quote as it would when creating a new quote in Accura.

CHANGE: Copied Online quotes will now use the same mark-up profile as the original quote. Before it would use the job type or client mark-up meaning there could be an unexpected change of price when the quote was processed.

FIX: Web console could hang when processing an order and the phrase library was enabled.

FIX: Quote letter PDFs would not get uploaded to the website if quote checking was enabled in system defaults.

FIX: Changing the client of a quote or order for web enabled customers wouldn't remove the record from the original client.

FIX: Delivery Note and Invoice document web tasks were not being created meaning the associated PDFs weren't uploaded to the website.

FIX: Quote and Order attachments coming from the Online module weren't adhering to Accura's attachment naming convention.



FIX: Clicking on the web console could make any quotes or orders that were currently being processed go behind the console itself.

FIX: Saving more than 10 attachments on a web order would not work correctly when saved to hot-folders. The attachments would still be save correctly to the Attachments\Orders folder.

